Consultant Handbook

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1. Introduction

This handbook applies to all independent contractors, consulting firms, subcontractors and temporary external specialists engaged by Frestedt Incorporated. This handbook is intended to supply consultants with additional essential information and operating standards to perform contracted work effectively within Frestedt Incorporated. This handbook supports, but does not replace, any independent consulting agreement (ICA) or associated statement of work (SOW) terms. The ICA, SOW and/or applicable policies supersede this handbook.

2. Expectations

Consultants must perform services as defined in the ICA and SOW and any changes to these services require written approval from the Frestedt Incorporated hiring manager prior to starting any activity. Consultants shall align with the Frestedt Incorporated culture grounded in honesty, transparency, professionalism, and proactive communication including:

- Integrity and truthfulness in all interactions
- Excellence in workmanship and work product delivery
- Respect toward people and diverse perspectives
- Accuracy and accountability
- Collaboration across and between teams

All consultant deliverables must:

- Meet Frestedt Incorporated quality standards
- Follow provided templates, formats and specific instructions
- Comply with Frestedt Incorporated style guide
- Be completed and submitted BEFORE assigned deadlines

Consultants must also:

- Demonstrate subject matter expertise
- Work independently with minimal oversight
- Communicate risks or delays early and often

3. Communications Protocols

Consultants must use clear communication in all activities including participation in group activities, meetings and interpersonal communications including emails and phone calls. Meeting communications protocols include:

- Attending scheduled meetings on time
- Providing agendas when leading sessions and adding agenda items when needed
- Sharing written summaries including decisions and action items
- Maintaining professional communication in all interactions

Consultants must reply to email and urgent communications within ONE business day. Project leaders must require clear bi-directional communication to and from the project team and to Frestedt Incorporated leadership.

5. Intellectual Property and Confidentiality

All work product created is Frestedt Incorporated Intellectual Property (IP) unless otherwise documented in the ICA. Consultants must maintain confidentiality when allowed to access sensitive, confidential and privileged information, including, but not limited to:

- Business strategies
- Financial data
- Customer or employee information
- Proprietary software, tools or processes

All such information requires protection by the consultant. Confidentiality remains expressly required in accordance with nondisclosure agreements, ICAs and Frestedt Incorporated policies.

6. Data Access, Protection, Handling and Use

Frestedt Incorporated provides data access on a need-to-know basis. Data access may be provided through:

- Email accounts
- Software systems
- Cloud-based servers
- Project management tools
- Shared drives
- VPN access

Whenever Frestedt Incorporated issues equipment to a consultant, the consultant must ensure data protection, appropriate data handing and must:

- Use equipment and systems **solely** to perform Frestedt Incorporated work as required
- Avoid installing unauthorized software and protect against malware
- Use appropriate secured systems to store or transmit data
- Protect personal devices from any potential data confidentiality breach
- Report any suspected data breach immediately
- Protect passwords and authentication devices
- Return all issued equipment when requested or when engagement concludes

7. Operational Procedures: Timekeeping, Invoicing, Travel Reimbursement

Consultants must track hours in 15-minute increments and should use the Frestedt Incorporated timekeeping system with incorporated weekly invoices including:

- Consultant name or firm
- Purchase order (if applicable)
- Billing period
- Invoice number
- Invoice date
- Hours worked
- Activities detailed
- Completed deliverables listed
- Remittance details including name, address, bank and tax information

Travel and expense reimbursable must:

- Be pre-approved in writing

- Follow travel guidelines
- Include itemized receipts

Frestedt Incorporated typically pays invoices and reimbursements within 30 days.

8. Professional, Ethical and Non-Conflicted Conduct

Consultants must conform to the Frestedt Incorporated Code of Conduct, not limited to:

- Treating all employees and partners with respect
- Avoiding harassment, inappropriate discrimination or inappropriate behavior
- Maintaining a professional appearance and demeanor

Consultants must maintain an impeccable ethical standard and must comply with:

- Applicable laws
- Industry regulations
- Company ethics policies

Consultants must avoid conflicts of interest and must immediately disclose:

- Any competing engagements
- Any personal or financial interests with a potential to influence their work

9. Legal Obligations, Compliance Requirements, Certifications & Training

All Frestedt Incorporated consultants must comply with laws, regulations and policies including, but not limited to, the following:

- Data privacy laws
- Health Insurance and Portability and Accountability Act (HIPAA)
- Anti- bribery, kick-back and corruption laws
- Import/export control regulations

Consultants must maintain licenses and certifications and must complete specific training sessions as required including, but not limited to, the following:

- Security awareness
- Compliance
- Industry specific certifications

Some engagements may require background screening depending on role sensitivity.

10. Engagement Management

10.1 Pre-Engagement

Frestedt Incorporated generally establishes a business case to add a consultant to the team by ensuring internal resources do not meet the specific need and the project objectives align with company goals. Frestedt Incorporated may need to complete multiple interviews, background checks, license/certification verifications and details needed to satisfy insurance requirements prior to fully executing the ICA, SOW and NDA (if applicable) as required to add a new consultant to the team. Appropriate onboarding materials should review consultant role and responsibility, project leadership, team structure and access to required company systems including any required software, email and collaboration tools.

The onboarding activities should introduce Consultants to the Frestedt Incorporated organization, reporting structure, values and operating norms including expectations regarding communication, performance, confidentiality, security and intellectual property. Consultants typically receive instructions regarding time tracking, invoicing, reimbursement, project-specific requirements and access to templates, style guides and documentation standards.

10.3 During Engagement

Consultants must complete projects on time and with sufficient quality to meet project needs as defined by Frestedt Incorporated. Frestedt Incorporated may conduct periodic performance reviews to assess:

- Work quality
- Timeliness
- Issues
- Communication effectiveness
- Expectation alignment

Consultants should escalate any concerns or issues to the hiring manager or to procurement, legal, HR or senior management as appropriate. Frestedt Incorporated may take action up to and including engagement termination in accordance with the ICA, for causes not limited to:

- Business changes
- Non performance
- Policy violations
- Misconduct

10.4 Post-Engagement

When consulting engagement ends, consultant must provide all final deliverables including:

- All work product
- All protocols, reports and supporting documentation
- All knowledge transfer materials to ensure successful and complete project transfer

In addition, consultant must return all company property including, but not limited to:

- Equipment
- Access badges
- Confidential documents

Frestedt Incorporated revokes all system access upon engagement completion.

11. Signature

Consultants must sign an acknowledgment confirming they have read and understood this handbook and agree to comply with its guidelines.

I, ________________________, have read and understood this Frestedt Incorporated Consultant Handbook. I understand my consulting relationship with Frestedt Incorporated is governed by specific terms in the ICA, SOW and Frestedt Incorporated policies. I understand I should direct any questions about this Handbook or my engagement to Dr. Frestedt, President and CEO of Frestedt Incorporated.

Consultant Signature: ____________________________

Consultant Printed name: ____________________________

Date: ____________________________

Appendix: Consultant Engagement Checklist

NOTE: If needed and assigned, use checklist to document progress through each stage gate defined by blue text to start and end the six stages.

1. Pre-Engagement

- ☐ 1.1 document business case (why do we need an additional consultant?)
- ☐ 1.2 confirm internal resources cannot meet specific need
- ☐ 1.3 list regulatory requirements (what legal and regulatory details must be met?)
- ☐ 1.4 specify return on investment (ROI) rationale (i.e., positive financial impact?)
- ☐ 1.5 define project objectives and expected outcomes/deliverables (specifications?)
- ☐ 1.6 list all stakeholders in responsible, accountable, consulted, informed (RACI) matrix
- ☐ 1.7 define and obtain budget approval from management
- ☐ 1.8 identify and list all considered and qualified consultants or firms
- ☐ 1.9 conduct capability and experience assessments
- ☐ 1.10 review references and past performance
- ☐ 1.11 evaluate rate structures and pricing models
- ☐ 1.12 draft independent consulting agreement (ICA) and statement of work (SOW)
- ☐ 1.13 if needed, execute NDA/confidentiality agreement before consultant discussion
- ☐ 1.14 discuss/negotiate ICA/SOW with potential consultant
- ☐ 1.15 confirm consultant meets all terms including insurance requirements
- ☐ 1.16 prepare onboarding materials and documentation
- ☐ 1.17 ensure HR file contains fully executed ICA/SOW/NDA

2. Project Setup

- ☐ 2.1 verify consultant role and responsibility within project
- ☐ 2.2 identify management-assigned project lead and team members
- ☐ 2.3 request system accounts and permissions
- ☐ 2.4 configure remote access and security control credentials
- ☐ 2.5 secure needed consultant equipment, if required
- ☐ 2.6 set up shared drives, folders and collaboration tools
- ☐ 2.7 assign mandatory training (e.g., security, confidentiality, project)
- ☐ 2.8 file approved background and debarment checks

- ☐ 2.9 document process to control drafts and finished documents
- ☐ 2.10 create company email account
- ☐ 2.11 add user to Grand Avenue Software (GAS), as appropriate
- ☐ 2.12 establish vendor in human resources (HR) and finance system files

3. Onboarding

- ☐ 3.1 schedule onboarding activities with consultant
- ☐ 3.2 explain Frestedt Incorporated organization and reporting requirements
- ☐ 3.3 review consulting relationship legal and regulatory requirements
- ☐ 3.4 review role and responsibility
- ☐ 3.5 review confidentiality and data protection requirements
- ☐ 3.6 review intellectual property (IP) deliverables and Frestedt Incorporated ownership
- ☐ 3.7 review acceptable use and security policies
- ☐ 3.8 review Frestedt Incorporated values, cultural expectations and working norms
- ☐ 3.9 review Consultant Handbook contents
- ☐ 3.10 establish expectations and goals
- ☐ 3.11 explain communication and escalation paths
- ☐ 3.12 review project scope, deliverables and success metrics
- ☐ 3.13 confirm project timelines, milestones and dependencies
- ☐ 3.14 assign required training (e.g., GAS access, compliance, security training)
- ☐ 3.15 share templates, style guides and documentation standards
- ☐ 3.16 review time tracking, invoicing and payment terms/timelines
- ☐ 3.17 confirm travel approval process, if applicable
- ☐ 3.18 review expense reimbursement rules, if applicable
- ☐ 3.19 review project calendar and key deadlines
- ☐ 3.20 schedule kick off meeting (KOM) and invite consultant to KOM

4. Project Management

- ☐ 4.1 hold KOM with team
- ☐ 4.2 review scope, deliverables and timelines
- ☐ 4.3 share project calendars and key deadlines
- ☐ 4.4 define communication cadence and meeting schedule

☐ 4.5 clarify decision making roles and approval workflows

☐ 4.6 share templates, style guides and documentation standards

☐ 4.7 hold weekly or bi weekly check ins

☐ 4.8 track and address risks, issues and dependencies promptly

☐ 4.9 review risk/issue escalation process and confirm risk reporting requirements

☐ 4.10 escalate blockers promptly

☐ 4.11 hold periodic check-in meetings to monitor milestones and deliverables

☐ 4.12 conduct performance reviews (i.e., deliverable accuracy, quality and completeness)

☐ 4.13 assess deliverable alignment with scope and quality expectations

☐ 4.14 provide feedback and request adjustments to timelines and resources, as needed

☐ 4.15 ensure documentation remains continuously updated throughout project

☐ 4.16 evaluate project outcomes vs. objectives

☐ 4.17 once all deliverables are completed, schedule close out meeting (COM)

☐ 4.18 collect all final deliverables and documentation

☐ 4.19 verify if consultant work product met acceptance criteria

☐ 4.20 document final review and sign off by stakeholders

☐ 4.21 conduct COM with internal debrief session and archive all project materials

☐ 4.22 identify lessons learned and document future engagement recommendations

☐ 4.23 evaluate and document overall consultant responsiveness and professionalism

5. Financial Management

☐ 5.1 ensure “on time” timesheet submissions and “accurate” work log details

☐ 5.2 document any record-keeping compliance issues

☐ 5.3 confirm consultant invoice accuracy against ICA, SOW and policies

☐ 5.4 approve or reject items as appropriate

☐ 5.5 return to consultant to correct errors, rejections or non-compliant activities

☐ 5.6 validate all deliverables before recommending payment

☐ 5.7 submit invoices to management

☐ 5.8 management and finance process approved invoices and disburse payments

☐ 5.9 monitor spend against approved budget and forecast remaining costs and budgets

☐ 5.10 flag potential overruns early and often

- ☐ 5.11 recommend ICA and/or SOW adjustments if scope changed during project
- ☐ 5.12 process contract amendments to secure management/legal approval
- ☐ 5.13 communicate changes to all stakeholders

6. End of Engagement

- ☐ 6.1 schedule handoff session
- ☐ 6.2 ensure internal teams receive training or walkthroughs to transfer knowledge
- ☐ 6.3 revoke system access
- ☐ 6.4 retrieve company equipment
- ☐ 6.5 confirm data deletion by consultant
- ☐ 6.6 process final invoice
- ☐ 6.7 document performance evaluation
- ☐ 6.8 update vendor records
- ☐ 6.9 record consultant performance rating
- ☐ 6.10 note strengths and improvement areas
- ☐ 6.11 recommend whether to re-engage consultant in future